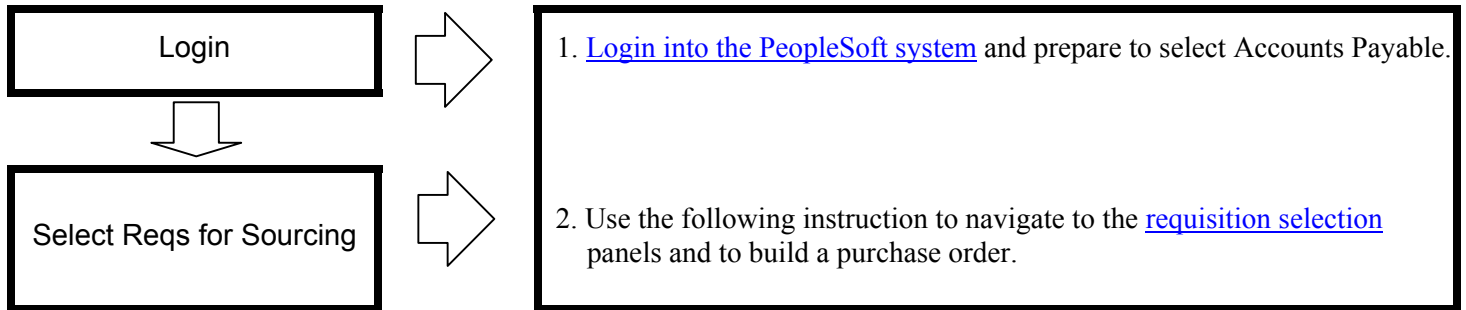


# How do I Select a Requisition?

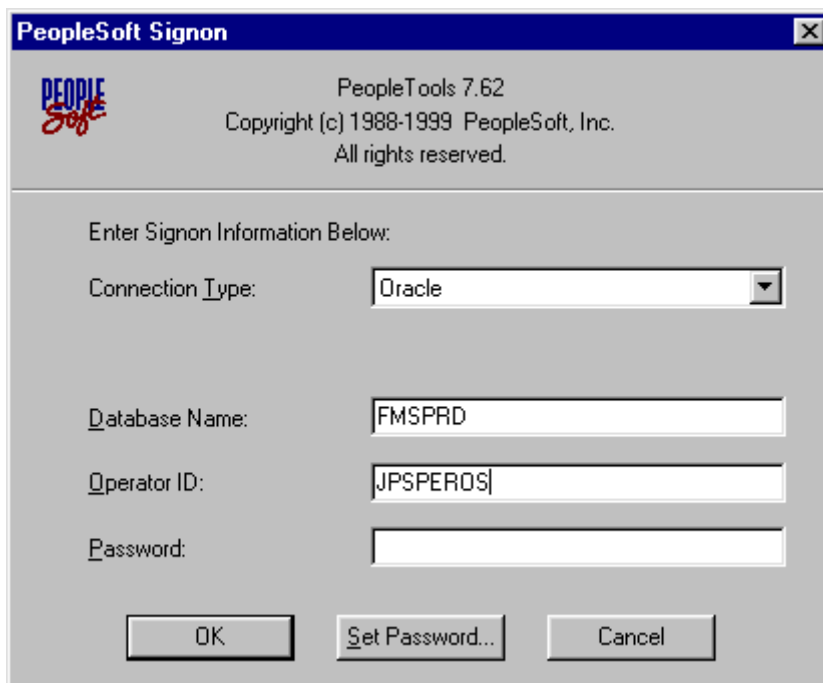
**Prior to the working a purchase order you must source the original requisition.**



# How do I Select a Requisition?

## Step 1: Login

- Launch the PeopleSoft Signon from the Novel Application launcher.
  - Connection type “Oracle” (Defaulted)
  - Database Name “FMSPRD” (Defaulted)
  - Enter your login name. (UPPERCASE only)
  - Password is your login name (lowercase only)
- Click “OK”



The image shows a screenshot of the 'PeopleSoft Signon' dialog box. The title bar is blue with the text 'PeopleSoft Signon' and a close button. The main area has a grey background. At the top left is the 'PEOPLE Soft' logo. To the right of the logo, it says 'PeopleTools 7.62' and 'Copyright (c) 1988-1999 PeopleSoft, Inc. All rights reserved.' Below this, it says 'Enter Signon Information Below:'. There are four input fields: 'Connection Type' with a dropdown menu showing 'Oracle', 'Database Name' with a text box containing 'FMSPRD', 'Operator ID' with a text box containing 'JPSPEROS', and 'Password' with an empty text box. At the bottom, there are three buttons: 'OK', 'Set Password...', and 'Cancel'.

# How do I Select a Requisition?


## Step 2: Selecting Sourcing Criteria and Defaults

From the Requisition Selection panel, you can select requisitions online from requisitions that could contain candidate lines. You can use a variety of selection criteria to select the Requisitions to choose from.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Purchase Orders
- ⇒ Use
- ⇒ Requisition Selection
- ⇒ Select Criteria

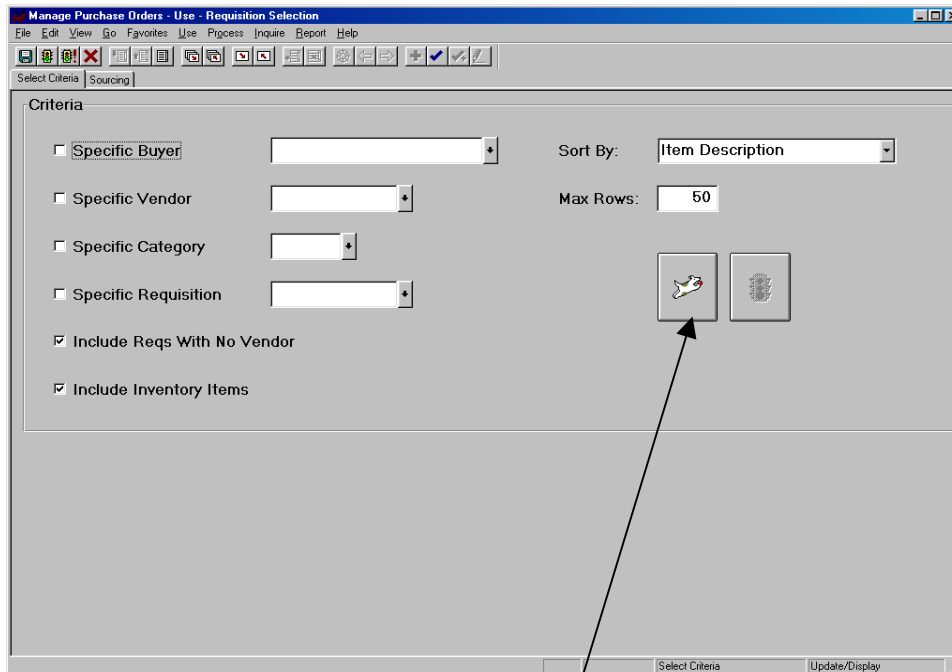
### Panel Controls

To limit the requisitions to be retrieved online for further selection, you can use as many criteria as needed. Select the values for these fields.

Specific Buyer	To specify a buyer, click on the Specific Buyer checkbox, and enter or select the buyer's Operator ID. The selected requisitions will include only requisitions lines that specify that buyer.
Specific Vendor	To specify a vendor, click Specific Vendor, and enter or select the Vendor. The selected requisitions will include only requisitions lines for the selected Vendor. When you select a specific vendor, the Include Reqs With No Vendor becomes unavailable for entry.
Specific Category	To specify a category, click on the Specific Category checkbox, and enter or select the category code. The selected requisitions will include only requisition lines that specify that category.
Specific Requisition	To select a specific requisition, click on the Specific Requisition checkbox and enter or select the Requisition ID.
Include Reqs With No Vendor	Click on the Include Reqs With No Vendor checkbox to select requisitions with and without a suggested vendor.
Include Inventory Items	The Online Select process allows you to select requisition lines for inventory items and stage them for Purchase Orders instead of Inventory Demand. To include requisition lines that would normally be sourced from inventory, click Include Inventory Items.
Sort By	You can select the order in which you want to view the requisitions selected. Your choices are: Item Description, Item ID, Requisition ID, Vendor ID.
Max Rows	To limit the amount of data returned, you can enter a number in the Max Rows field.
	After you set your criteria, click the Select Requisitions Now button to retrieve the requisitions that match your selection. They appear in the Sourcing panel. To access this panel, click the Sourcing folder tab.


# How do I Select a Requisition?

*The Requisition Selection panel displays*

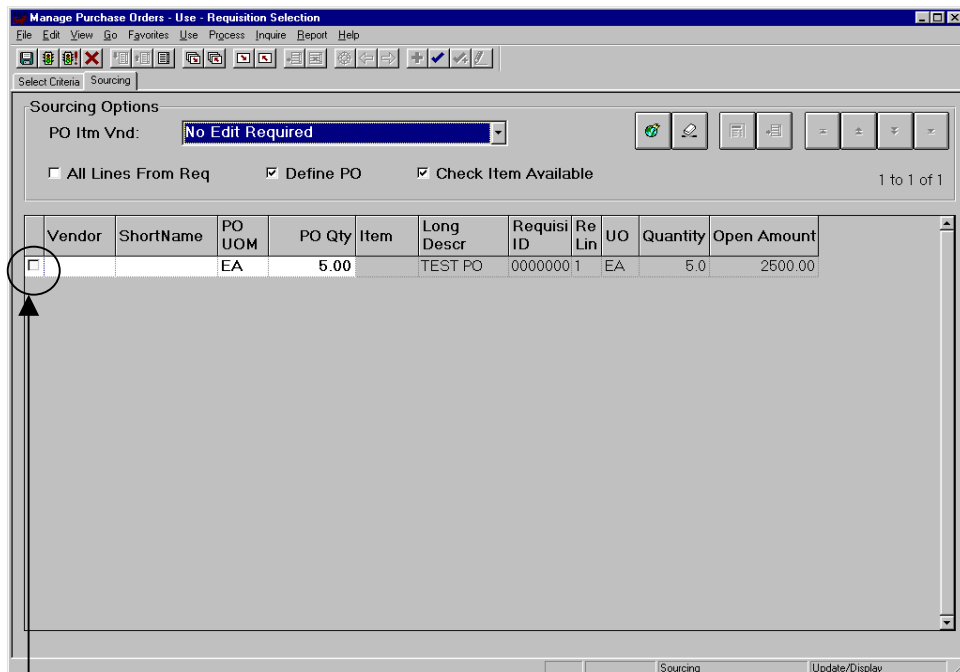


At LBNL we will be clicking on the selection boxes for;

- ⇒ Include Inventory Items
- ⇒ Includes Req's with no Vendors
- ⇒ Specific Buyer
  - On this selection you can narrow your field to the specific buyer you want to access

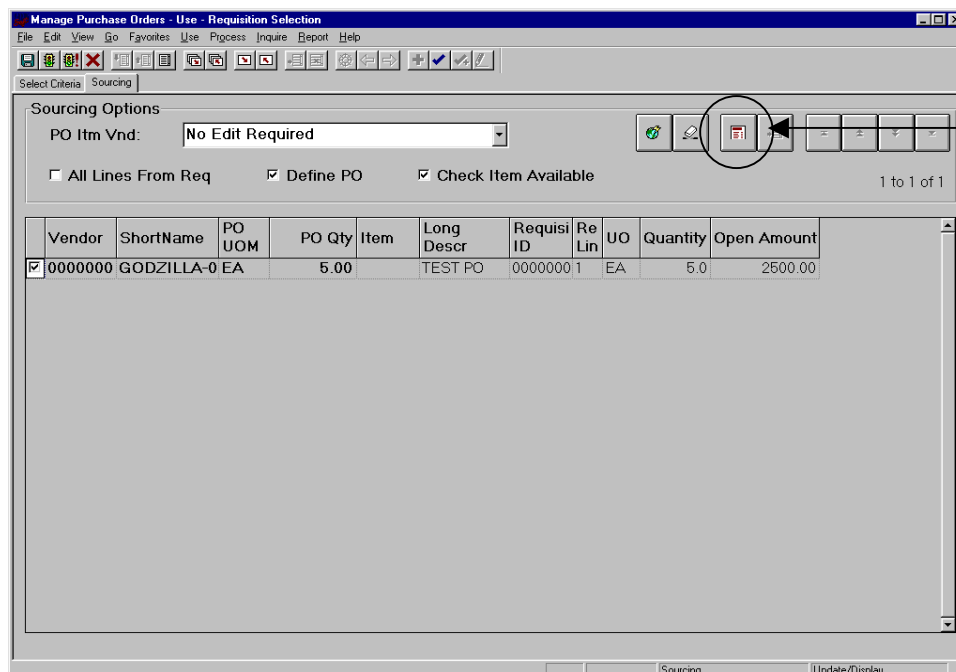
Once completed click on the **Fetch**  button.

# How do I Select a Requisition?



Vendor	ShortName	PO UOM	PO Qty	Item	Long Descr	Requisi ID	Re Lin	UO	Quantity	Open Amount
<input checked="" type="checkbox"/>		EA	5.00	TEST PO		00000000	1	EA	5.0	2500.00

- If the requisition does not include a vendor at this point, you will be required to add a vendor prior to proceeding.
- Once the vendor has been selected click on the selection box.
- After you've activated the "Selection Box", click on the "Staging Icon".

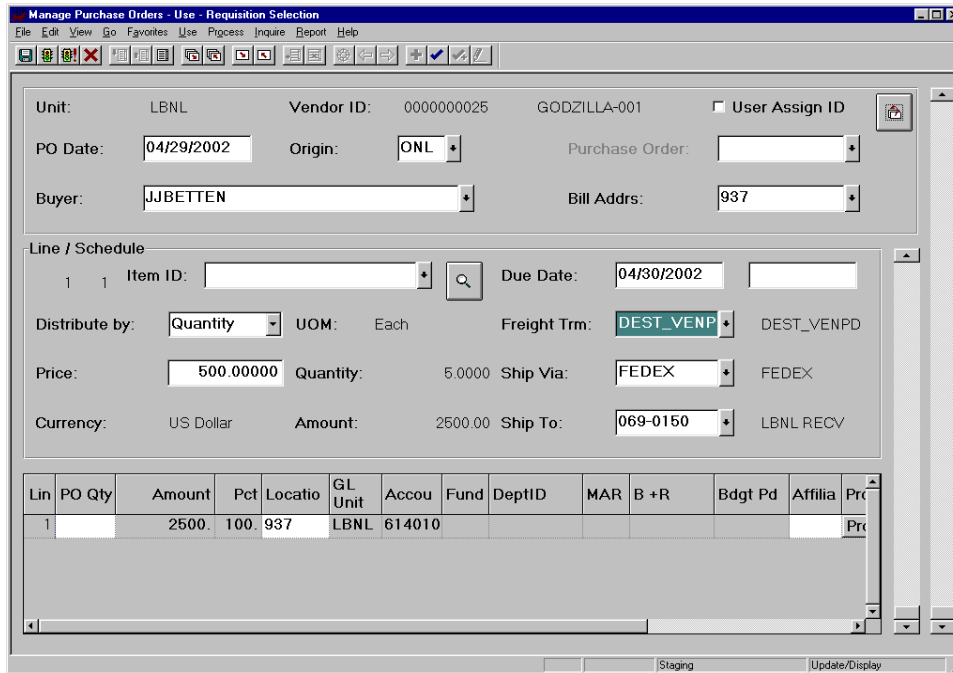


Vendor	ShortName	PO UOM	PO Qty	Item	Long Descr	Requisi ID	Re Lin	UO	Quantity	Open Amount
<input checked="" type="checkbox"/>	00000000	GODZILLA-0	EA	5.00	TEST PO	00000000	1	EA	5.0	2500.00

Staging Icon

# How do I Select a Requisition?

*The Staging Panel will be displayed.*



Unit: LBNL Vendor ID: 0000000025 GODZILLA-001 ☐ User Assign ID

PO Date: 04/29/2002 Origin: ONL Purchase Order:

Buyer: JJBETTEN Bill Addr: 937

Line / Schedule  
1 1 Item ID: Due Date: 04/30/2002

Distribute by: Quantity UOM: Each Freight Trm: DEST\_VENP DEST\_VENPD

Price: 500.00000 Quantity: 5.0000 Ship Via: FEDEX FEDEX

Currency: US Dollar Amount: 2500.00 Ship To: 069-0150 LBNL RECV

Lin	PO Qty	Amount	Pct	Locatio	GL Unit	Accou	Fund	DeptID	MAR	B +R	Bdgt Pd	Affilia	Prc
1	1	2500.	100	937	LBNL	614010							Pr

Staging Update/Display

Change any information on this panel that is required and click **Save** .

Once the panel is saved, the selected requisition will be sent to a purchasing table where it will be picked up during the purchase order build process.